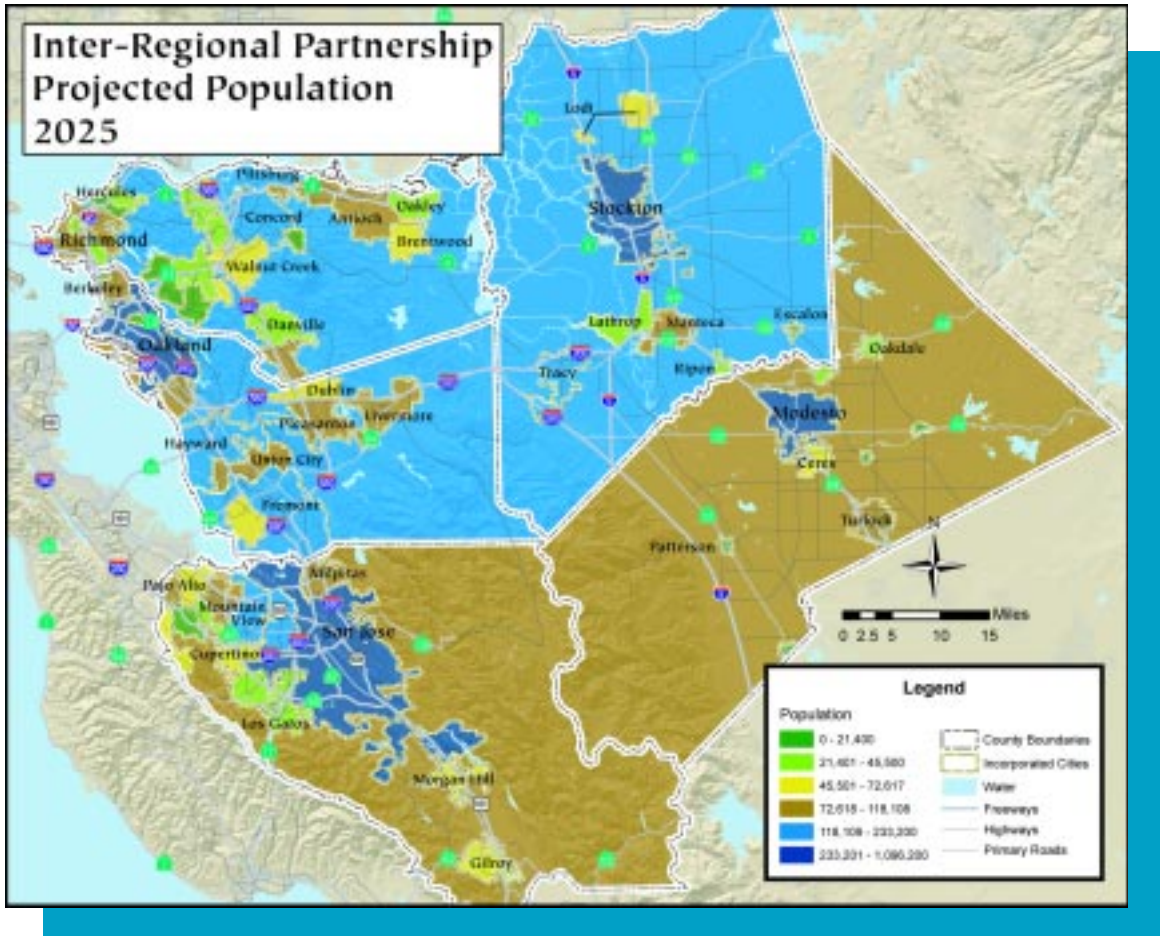
Introduction

This document examines the growth trends of the five counties that make up the San Francisco Bay Area - Central Valley Inter-Regional Partnership (IRP). The Inter-Regional Partnership was formed in 1998 as a partnership between fifteen elected officials representing five counties - Alameda, Contra Costa, San Joaquin, Santa Clara, and Stanislaus. Through the IRP, these local representatives work to bridge jurisdictional boundaries to forge cooperative solutions to shared problems. These problems include the geographic separation of housing and employment; mounting traffic and air pollution; and unbalanced growth. Three councils of governments (COGs)—the Association of Bay Area Governments, the San Joaquin Council of Governments, and the Stanislaus Council of Governments—provide staffing, financial support and regional expertise to the IRP.



In this document, population, housing and job growth trends through 2025 are summarized for the entire IRP region and the counties therein. The data for the counties and much of the text comes directly from the individual COGs, as each COG has developed a complete set of projections for their own use.

Jobs/housing balance relationships have been identified as one of the key issues for the IRP. Therefore, job growth and the relationship to housing has been detailed for the region and each county.

Graphs, charts and maps are provided as data synopses and to visually depict the anticipated growth over the next 25 years in this dynamic and diverse region.

Population Growth

Over the next 25 years the population of the five counties of the San Francisco Bay Area - Central Valley Inter-Regional Partnership, made up of Alameda, Contra Costa, San Joaquin, Santa Clara and Stanislaus counties, will grow by over 32 percent, to over 6.7 million people.

The Bay Area counties of Alameda, Contra Costa and Santa Clara will continue to be more populous than their rural neighboring counties with a 2025 projected combined population of nearly 5 million people. Santa Clara County is projected to continue to be the most populous of the Bay Area IRP counties, with well over 2 million people by 2025. Contra Costa County, while the least populous of the Bay Area counties, will experience the greatest rate of growth at 28 percent from 2000 to 2025.

The Central Valley counties of Stanislaus and San Joaquin will continue to be significantly less urban than the Bay Area IRP counties. However, both counties are projected to experience tremendous rates of growth in the next 25 years. Stanislaus County's population is expected to grow by 85 percent over the next 25 years to over 826,00 residents. San Joaquin County's population will grow by 59 percent, from a current population of 566,600 to well over 900,000. By comparison, the Bay Area counties of the IRP will grow by only 22 percent over the same period.

POPULATION

	2000	2005	2010	2015	2020	2025
Alameda	1,443,741	1,534,400	1,588,900	1,628,800	1,669,400	1,714,200
Contra Costa	948,816	1,013,200	1,074,500	1,128,800	1,179,500	1,209,900
San Joaquin	566,600	633,348	700,095	766,843	821,851	900,338
Santa Clara	1,682,585	1,788,300	1,879,700	1,949,500	2,007,500	2,064,200
Stanislaus	446,997	522,822	598,647	674,473	750,298	826,123
IRP Region	**5,088,739**	**5,492,070**	**5,841,842**	**6,148,416**	**6,428,549**	**6,714,761**

Residential Growth

The five counties that make up the IRP region will add over a half-million households for a total of over 2.3 million by 2025. This figure represents a 33 percent growth over current levels. Household growth is projected to be the strongest in the rural counties of San Joaquin and Stanislaus and be slower, yet steady, in the more urban Bay Area counties.

The Bay Area counties of Alameda, Contra Costa and Santa Clara combined, will add a little over 317,000 housing units to current figures. Alameda County will see the slowest household growth. Alameda will add only a little over 88,000 units in the next 25 years or 17 percent over 2000 figures. Santa Clara County will add over 129,000 units, or 23 percent over current levels. Of the Bay Area counties in the IRP region, Contra Costa is projected to experience the highest rate of growth, 29 percent in the next couple of decades.

The Central Valley counties of Stanislaus and San Joaquin are projected to add a tremendous amount of housing to their existing stock. Stanislaus County is expected to add over 150,000 units, or 91 percent over the next 25 years. San Joaquin County's households will grow by 57 percent, from the current 202,320 to well over 300,000 units.

HOUSEHOLDS

	2000	2005	2010	2015	2020	2025
Alameda	523,366	543,400	562,010	578,540	595,540	611,680
Contra Costa	344,129	364,129	387,960	408,870	428,870	443,510
San Joaquin	202,320	225,185	248,094	270,994	293,903	316,768
Santa Clara	565,863	596,760	626,730	625,470	674,410	695,170
Stanislaus	145,146	175,379	205,612	235,846	266,079	296,312
IRP Region	**1,780,824**	**1,905,634**	**2,030,406**	**2,146,720**	**2,258,662**	**2,363,440**

Job Growth

With the dot-com bubble burst in 2000 and 2001, the IRP region, along with the rest of the nation entered into a recession. Although the near term job opportunities in the IRP counties will continue to be impacted by the effects of this recession, the long-term prospects of the Bay Area and Central Valley economies are positive.

By 2025, over 3.5 million jobs will be located in the five IRP counties, a 36 percent increase over current levels. In the next five to ten years, however, job growth is projected to remain stable at 14.5 percent.

In the Bay Area counties of the IRP, growth in the number of jobs in the short term is expected to be limited. The long-term forecast, however, shows significant change. The Bay Area has an unusually high concentration of computer electronics, telecommunications, and computer software jobs. In addition, the Bay Area is one of the leading regions for biomedical research and development. Some of the nation's top universities and research institutes nurture and support these industries. A varied economy that includes finance, tourism, and government completes the picture. (Source: *Projections 2002,* Association of Bay Area Governments)

The IRP's Central Valley counties are projected to add over 218,670 new jobs to their economy by 2025, 56 percent more than their current combined total jobs. San Joaquin County will add 81,898 new jobs for a total of 283,569 jobs by 2025. Stanislaus County projects over 73 percent growth in total jobs over the next couple of decades. Currently, Stanislaus County has well over 186,000 jobs, but expects to see over 323,000 jobs by 2025.

JOBS

	2000	2005	2010	2015	2020	2025
Alameda	751,680	790,400	857,450	914,790	964,740	1,014,190
Contra Costa	361,110	385,050	419,140	445,140	470,480	495,460
San Joaquin	201,671	218,051	234,430	250,810	267,189	283,569
Santa Clara	1,092,330	1,130,860	1,216,200	1,288,800	1,341,430	1,395,830
Stanislaus	186,235	213,590	240,945	268,300	295,655	323,010
IRP Region	**2,593,026**	**2,737,951**	**2,968,165**	**3,167,840**	**3,339,494**	**3,512,059**

Jobs/Housing Balance

Jobs/housing balance is measured by the ratio of the number of jobs against the number of housing units. Ideally, there should be 1.5 jobs available per household (occupied housing unit) in any given community. A jurisdiction is said to having a jobs/housing "imbalance" when their jobs/housing ratio is greater than or less than 1.5. A community with more jobs than housing, will have a high jobs/housing balance, i.e. greather than 1.5. A community with more housing than jobs will have a jobs/housing ratio that is less than 1.5. This measure was developed by the California State Department of Housing and Community Development.

Not surprisingly, jobs and housing in the IRP region, as a whole, are relatively balanced. The current jobs/housing balance figure for the region is at 1.46. This ratio is only projected to increase by 2 percent to a near perfect 1.49 by 2025. This balance is quite deceptive. Although the region does have a jobs/housing balance, there is an inherent problem in how that balance is achieved.

The IRP region achieves its seemingly reassuring jobs/housing balance because there is so much imbalance in the individual counties that make up the region. The Bay Area counties of Santa Clara and Alameda each have significant housing shortfalls, where they are producing far fewer homes than jobs. Santa Clara County has a jobs/housing ratio of 1.93. That figure is projected to increase to 2.01 by 2025. Santa Clara County's jobs/housing ratios translate into over 235,000 housing units that in theory should be built in the county by 2025.

HOUSING SUPRLUSES & SHORTFALLS

	2000 Housing Surplus/Shortfall	2025 Housing Surplus/Shortfall	2000 -2025 Percent Change
Alameda	22,246	-64,446	-390 %
Contra Costa	103,389	113,203	10 %
San Joaquin	67,873	127,722	88 %
Santa Clara	-162,357	-235,383	46 %
Stanislaus	20,990	80,792	285 %
IRP Region	**52,140**	**22,068**	**-58 %**

Like Santa Clara County, Alameda County will also see a significant housing shortfall by 2025. Over 64,440 housing units are needed to house all the new workers that are projected to come to the County for employment by 2025. Instead, Alameda will see its jobs/housing ratio increase from 1.43 to 1.66 by 2025, indicating that job development will outpace housing development in the next 25 years.

In contrast, the Central Valley counties of San Joaquin and Stanislaus and eastern Contra Costa County are producing a tremendous amount of housing. San Joaquin County alone will produce an excess of 127,700 housing units over what is needed to house its own workers. Stanislaus County will see a remarkable 285% increase in its current housing "surplus" of 20,990. By 2025, Stanislaus County will be producing over 80,790 housing units more than it needs to achieve a jobs/housing balance.

Housing production in San Joaquin, Stanislaus and eastern Contra Costa County offsets the job production in the inner Bay Area, creating a jobs/housing balanced region that is in reality highly unbalanced. In total, the outlying areas of the IRP region are producing over 321,700 housing units to essentially house inner Bay Area workers.